

CopilotAgents

in Microsoft 365

FROM PRE-BUILT AGENTS TO COPILOT STUDIO

3–5 Hours

Individual Coaching

Online

Note:

This training is conducted by an AI system as trainer (e.g. ChatGPT or Claude — Gemini is not recommended) — upload both Markdown files (Systemprompt.md and Content.md) and type "start". No human trainer required.

Download files: <https://www.foundic.org/en/category/training/>



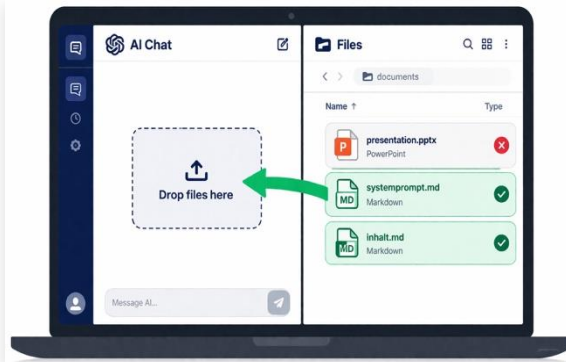
FOUNDIC.org



Training Setup

AI System / LLM Recommendation: Claude (best choice) ChatGPT
 Copilot (limited) Gemini
Copilot users: instead of "start" please type "Please follow the Markdownfile strictly"

1 Load Files into the Chat

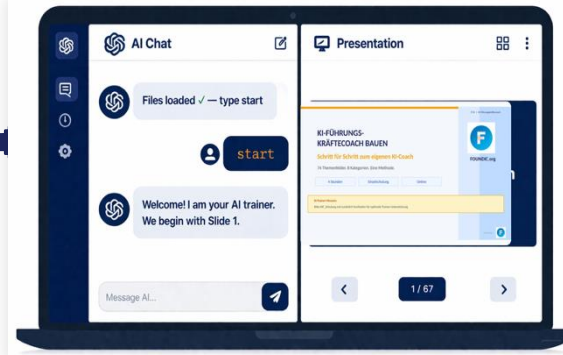


- ① **Open your LLM in the browser**
ChatGPT or Claude (recommended) — no Gemini! — text mode (no audio!)
- ② **Upload both Markdown files**
systemprompt.md + content.md via drag & drop
- ❌ **Do NOT upload the PowerPoint**
Only the two .md files belong in the chat

⚠️ No audio yet — files can only be loaded in text mode.

📄 **Files missing?** Download:
foundic.org/en/category/training/

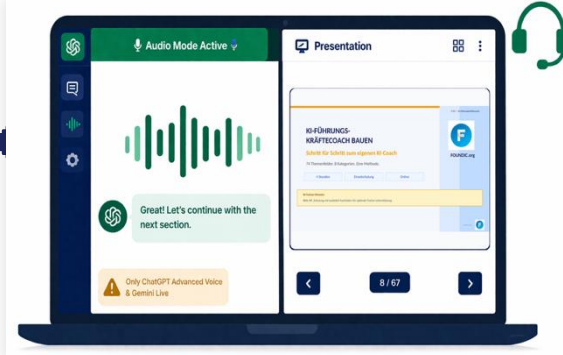
2 Begin training with "start"



- ① **Type the word: start**
One single word is enough — the trainer starts automatically
- ② **Split your screen**
Left: chat window · Right: open PowerPoint slides

✓ **The slides are your visual anchor — the trainer tells you when to click forward.**

3 Optional: Activate audio mode



- ① **Complete Steps 1 & 2 first**
Load the files and type "start" — only then switch to audio
- ② **Activate audio mode**
ChatGPT: headphones icon ·
- ③ **Put on headset & speak**
View slides, speak freely with the trainer

Only available in ChatGPT (Advanced Voice) — not in Claude.

What Is a Copilot Agent? Distinction & Classification

COPILOT

 On demand — you ask, it answers


 General knowledge + your M365 context

 Single task: summarize, write

 Always waits for your next prompt



COPILOT AGENT

 Proactive — acts based on rules

 Focused knowledge from your sources

 Multi-step tasks: Trigger → Action

 Can independently initiate next steps

5 Tools — Which One Do I Need When?



Copilot Chat

Ask questions, create texts, search your own M365 data.
No setup required.



Deklarativer Agent

Copilot with its own knowledge focus and its own sources.
Agent Builder is sufficient.



Workflow Agent

If-Then automation with conversation channel.
Trigger → Condition → Action.



Copilot Studio Agent

Complex dialogues, external APIs, org-wide rollout.
Separate license required.



Power Automate

Pure process automation without conversation channel.
Ideal for rule-based background processes.

Agents Are an Organizational Topic — Not Just a Tool Topic

"Those who introduce agents without governance do not risk chaos — they risk inefficient effort that they will later clean up three times over."

Access & Licenses

- Microsoft 365 Copilot license
- IT approval for agent creation
- Details: Slide CA-08e CA-08e CA-08

Data Structure

- SharePoint clean and current
- Permissions correctly set
- An agent is only as good as its sources as its sources

Governance Policy

- Who builds agents? Who approves?
- Data protection check before rollout
- We cover this in more depth in Module 5 dive in Module 5ul 5

The Agent Architecture Model — 4 Building Blocks

1 Knowledge sources

SharePoint documents · Teams files · Web content · Databases
The raw material of the agent — what it knows

2 Behavior & Rules

Tone, focus, constraints · What the agent does and does not do
Its character and its limits

3 Functions & Actions

Create files · Send emails · Create Planner tasks
What the agent can actively do

4 Triggers & Channels

Teams chat · Copilot interface · Power Automate flow
Where and how the agent is activated

Pre-built Agents — What Is Already in the M365 Ecosystem?

SharePoint Agent

Answer questions about your SharePoint content

Example: "What does our quality manual say about returns?"

Where: SharePoint site → Copilot icon

Business Chat Agent

Cross-cutting questions about your M365 data

Example: "Summarize all emails from Bernd this week."

Where: M365.com → Copilot

Teams Meeting Agent

Meeting notes, actions, summaries

Example: "What was decided in our Q3 meeting?"

Where: Teams → Meeting → Copilot tab

Agent Store

Industry-specific agents from Microsoft & partners

Example: HR agent, sales agent, ServiceNow integration and more

Where: Teams → Apps → Agents & more

When Do I Use What? — The Decision Matrix

Copilot

Occasion: Quick questions & drafts

Tech: ●○○○

→ Always — no setup required

Pre-built Agent

Use case: Standard tasks (HR, Sales)

Tech: ●○○○

→ Use when a suitable agent exists in the store

Workflow Agent

Occasion: If-Then: Trigger → Action

Tech: ●●○○

→ Recurring, rules-based tasks

Agent Builder

Use case: Own specialized agent with own sources

Tech: ●●○○

→ Specialized internal assistant

Copilot Studio

Use case: Complex logic + external APIs

Tech: ●●●○

→ IT-led implementation, organization-wide rollout

Power Automate

Use case: Pure process automation (no chat)

Tech: ●●○○

→ When no conversation channel is needed

What Does Your Organization Need Before the First Agent?

Governance Framework: Clarify these topics before the first agent goes live.

Licenses & Access

Microsoft 365 Copilot license required · E3/E5 + Copilot Add-on
Agent Builder: included in Copilot interface
Copilot Studio: separate capacity-based license — prices vary, please check directly with Microsoft

SharePoint structure

Documents without structure = poor agent
Clear folder hierarchy, naming conventions, current content
Permissions: who is allowed to see what?

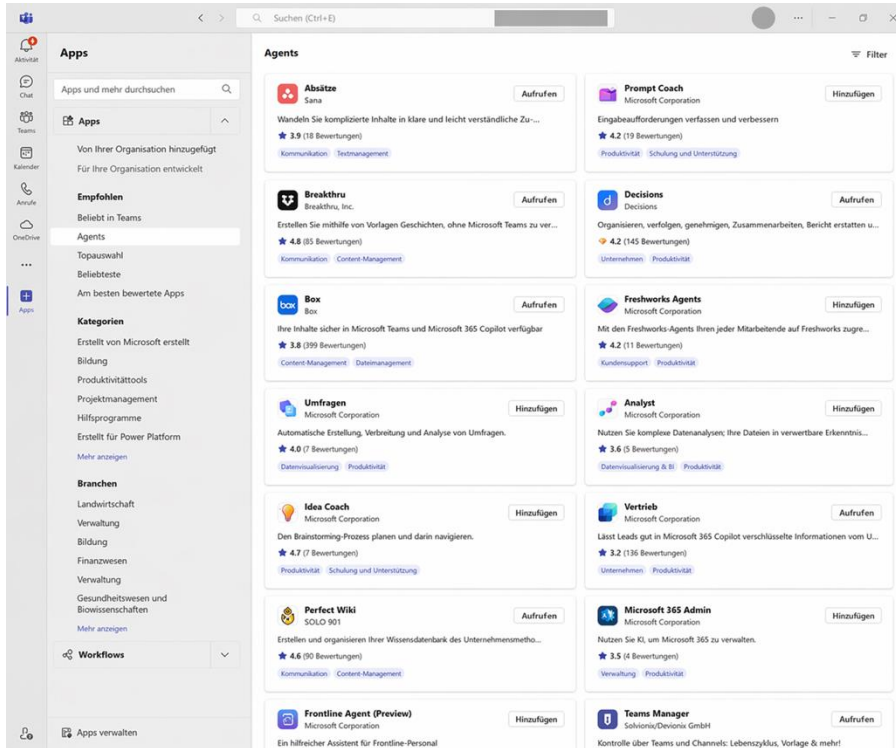
Connectors & integrations

Which data sources should the agent know?
SharePoint, Teams, Web: standard · SAP/CRM: Copilot Studio required
IT clearance for external connectors

IT approval & governance

Who approves new agents? Who maintains them?
Data protection check: which data may the agent process?
Agent Governance Policy before rollout!

Invoke, Start, and Test Agents in M365



- 1 Teams → Apps → "Agents & more" or Copilot icon
- 2 Select agent → "Open in Teams" or "Try it"
- 3 Ask first question — agent responds from its sources
- 4 Give "Feedback" if response is inappropriate



Agents Docs

📌 Pre-built agents in Teams: 3 clicks to the first response — no setup, no IT ticket.



Data Protection Traffic Light for Agents — Know the Specific Risks

GREEN — Safe for Agents:

- Your own internal SharePoint documents as knowledge source
- Anonymized process descriptions and manuals
- Teams channel content with your own access
- Public company information and FAQ pages

YELLOW — Review & document:

- Customer communications (check confidentiality)
- External partner documents (NDA in place?)
- HR process documents without personal reference
- Agent actions that send emails or create tasks

RED — Not suitable as an agent knowledge source:

- Personnel data or salary documents of individuals
- Medical data or health information
- Passwords, access credentials, security keys
- Contract data with explicit NDA/confidentiality clause



Exercise: Bernd Tests a Pre-built Finance Agent

 **SITUATION:** Bernd finds a "Finance Assistant" agent in the Teams Agent Store. He wants to know if this agent can support his month-end workflow — or if he'd rather build his own.

YOUR TASK

1 — Which 3 test questions would you ask the Finance Agent to check its knowledge level?

2 At what point would the pre-built agent hit its limits — and why?

3 — Decision: Do you use the pre-built agent, or build your own? Explain your reasoning.

Learning Check — Module 1: Agent Fundamentals

6 questions — 1 correct answer each.

Question 1 What distinguishes an agent from Copilot?

- A) Copilot is more expensive
- B) Agent = reactive, Copilot = proactive
- C) Agent = proactive and specialized, Copilot = reactive
- D) Copilot automatically builds agents

Question 3 Main limitation of pre-built agents?

- A) They can do nothing at all
- B) Only usable in Outlook
- C) No access to internal company data
- D) Need IT support for every start

Question 5 Data Protection Traffic Light RED for Agents — what NOT as a source?

- A) Internal anonymized FAQs
- B) SharePoint process manuals
- C) Personnel data and salary documents
- D) Public company information

Question 2 How many building blocks does the Agent Architecture Model have?

- A) 2 (Knowledge and Actions)
- B) 3 (Knowledge, Tone, Channel)
- C) 5 (CRAFT model)
- D) 4: Knowledge sources, Behavior, Functions, Triggers

Question 4 For If-Then with a conversation channel, use:

- A) No difference
- B) Pre-built store agent
- C) Workflow Agent
- D) Copilot Studio

Question 6 Difference Agent Builder vs. Copilot Studio?

- A) No difference
- B) Copilot Studio is simpler
- C) Builder = no code for specialized agents, Studio = complex + APIs
- D) Only Copilot Studio is available



BREAK

Screen off - briefly stand up - back in 15 minutes

After the break: Module 2 — Build a Workflow Agent: If-Then Logic Without


💡 Think about: Look at the Decision Matrix (CA-07). Which tool would you choose for your most frequent repetitive task??


Workflow Agent — If-Then Logic for Copilot


A Workflow Agent is a Copilot Agent that acts automatically when a defined condition is met — without you having to trigger every step manually.

 Email with specific subject → automatic reply + create task

 New document in SharePoint → notification + approval request

 Planner task set to "Done" → email to manager + entry in OneNote

 Meeting ends → automatic notes + action items in Planner

 Distinction: Workflow Agent = has conversation channel (Teams, Copilot). Power Automate = pure process automation without chat.

 Workflow Agent = If-Then with conversation channel — it can respond, explain, and ask follow-up questions. That distinguishes it from Power Automate.

Triggers · Conditions · Actions — The 3 Building Blocks

TRIGGER

What starts the workflow?

- Email received
- Document uploaded
- Form submitted
- Date/time reached
- Teams message
- Planner status changed

BEDINGUNG

Wann soll der Agent aktiv werden?

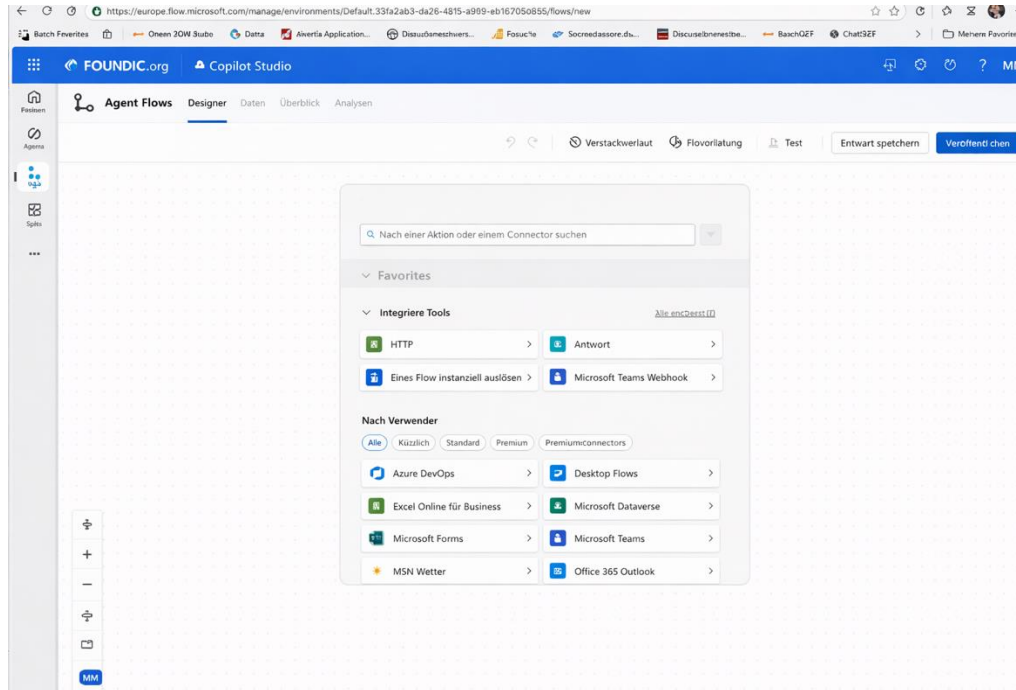
- Sender contains X
- Subject contains "Press inquiry"
- Folder = "For Review"
- Priority = High
- Category = Finance
- Timeframe: Mon–Fri

AKTION

Was soll passieren?

- Send email
- Teams message posten
- Create Planner task
- Save to SharePoint
- Request approval
- Create summary

Create a Workflow Agent — Step by Step



- 1 Browser: copilotstudio.microsoft.com
Copilot Studio → "Neuen Agent erstellen" → "Workflow"
- 2 Define trigger: Email / SharePoint / Teams / Time
- 3 Add condition: Subject contains / From / Category
- 4 Configure action(s) → Test → Publish



Workflow Agent

Human-in-the-Loop — When Humans Decide

HITL Gate = a control point in the workflow where a human must actively confirm before the agent continues acting.

ALWAYS BUILD A HITL GATE FOR:

✓ Sending emails on behalf of a person

✓ Triggering external communications

✓ Financial approvals or budget requests

✓ Deletion actions or overwrites

POSSIBLE WITHOUT HITL:


🔄 Internal notifications (Teams)

🔄 Filing documents in defined folders

🔄 Creating internal summaries

🔄 Creating tasks with a known owner

Exercise: Tanja Builds Her First Workflow Agent


 **SITUATION:** Tanja receives 3–8 press inquiries per email daily. Each must be manually confirmed, entered in Planner, and forwarded to the PR channel. This takes 15–20 minutes per inquiry.

YOUR TASK: SKETCH TANJA'S WORKFLOW AGENT


TRIGGER

 **TRIGGER** — *What starts Tanja's agent? Describe the trigger precisely.*

BEDINGUNG

 **CONDITION** — *How does the agent recognize a press inquiry? Which condition covers that?*

AKTIONEN + HITL?

 **ACTIONS + HITL?** — *Which actions should the agent perform — and where does it need Tanja's approval?*

Limitations of the Workflow Agent — When Agent Builder Is Better

✘ No complex reasoning

✘ No complex reasoning: The Workflow Agent follows rules, does not interpret. With exceptions and edge cases it cannot proceed.

✘ No dynamic knowledge retrieval

✘ No dynamic knowledge retrieval: Workflow Agent has no own knowledge sources. It performs actions — does not ask follow-up questions.

✔ When Workflow Agent Is Still the Right Choice

When: The task is clearly rule-based, no conversation needed, reliability more important than flexibility.

Learning Check 2 - Module 2: Workflow Agent

6 questions — 1 correct answer each.

Question 1 What is a Workflow Agent?

- A) Pre-built agent from the Teams Store
- B) Agent that acts automatically on If-Then rules
- C) Agent that is only started manually
- D) Synonym for Power Automate

Question 3 When ALWAYS build a HITL Gate?

- A) For internal Teams notifications
- B) For automatic internal file filing
- C) For external communications or financial approvals
- D) For internal meeting summaries

Question 5 Tanja's agent: Which action without a HITL Gate?

- A) External reply to journalist
- B) Release budget for campaign
- C) Acknowledgment of receipt to sender
- D) Publish press release

Question 2 What is a 'trigger' in a Workflow Agent?

- A) The result of the action
- B) The restriction condition
- C) The event that starts the workflow
- D) The name of the agent

Question 4 What distinguishes Workflow Agent from Power Automate?

- A) No difference
- B) Workflow Agent has conversation channel and can communicate
- C) Power Automate is newer
- D) Workflow Agent needs IT support

Question 6 A condition in a Workflow Agent can be:

- A) Only schedules
- B) Only sender address
- C) Subject keywords, sender, category, or date
- D) Only filename



BREAK

Screen off - briefly stand up - back in 15 minutes

After the break: [Module 3 — Agent Builder: Your Own Specialized Agent](#)

💡 Think about: Which process off your daily work would you as a Workflow Agent build — and where would you a HITL Gate?

Agent Builder — Overview & Kick-off

Agent Builder = Low-code interface in M365 for building your own AI assistants without programming — also usable as entry point into Copilot Studio. tenten ohne Programmierung — auch als Kick-offspunkt in Copilot Studio nutzbar.

Focused Assistant

Answers questions only within its topic area — no general noise

Own Knowledge Sources

SharePoint documents, Teams files, websites — the agent knows your content

Configurable Behavior

Tone, language, topic constraints — the agent behaves how you want it to

Actions & Integrations

Create files, write emails, Planner tasks — agent acts, not just answers

Knowledge Sources — 4 Types and Their Properties

1 SharePoint & OneDrive

✓ Always current · Permissions inherited · Ideal for internal documents

⚠ *Quality of filing structure is decisive*

2 Teams Channels & Chats

✓ Current discussions · Decisions in context · Team knowledge

⚠ *Private channels and chats only with permission*

3 Public Websites

✓ External references · Product information · Industry standards

⚠ *Not suitable for confidential use cases*

4 APIs & externe Systeme






✓ Live data · ERP/CRM connection · Real-time context

⚠ *Requires Copilot Studio + API configuration*

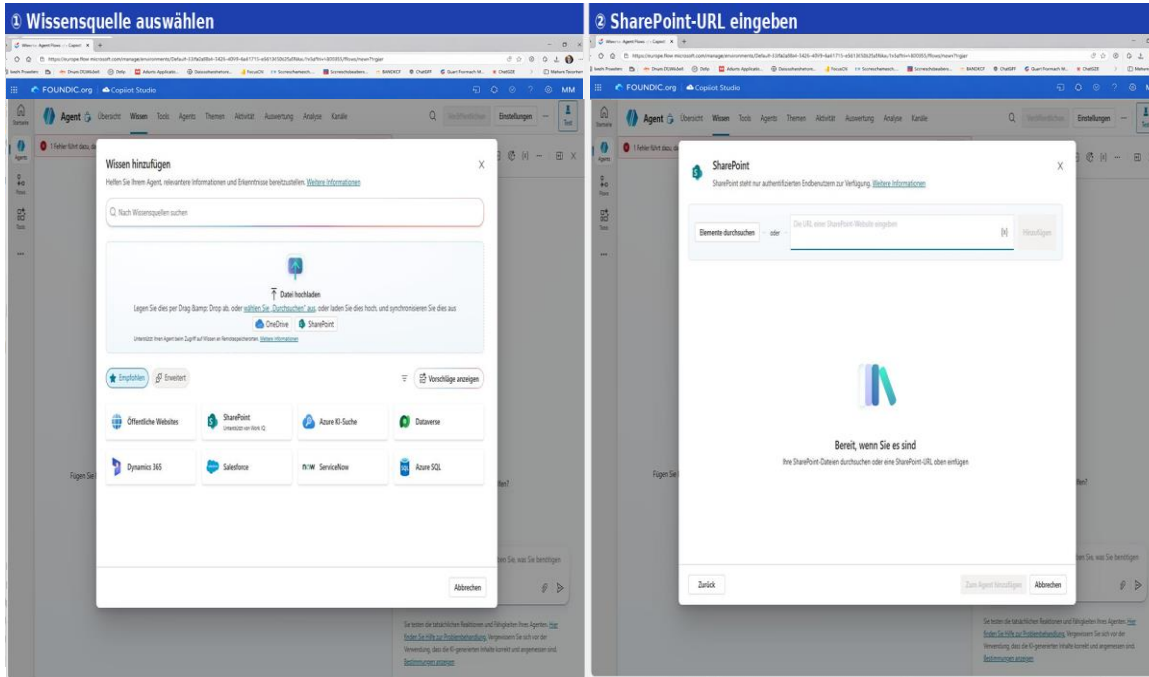
Garbage In, Garbage Out — Knowledge Source Quality Is Decisive

„Ein schlechter Informationsraum erzeugt keinen guten Agent — nur einen schnellen schlechten.“

THE 5 MOST COMMON MISTAKES IN PRACTICE

-  Poor SharePoint structure: Documents without organization, no categories → agent finds nothing
-  Falsche Berechtigungen: Agent sieht Ordner die er nicht soll — oder umgekehrt: sieht nicht was er braucht
-  Outdated documents: 3-year-old process description as source → agent gives outdated answers with full confidence
-  Unsauber benannte Dateien: „Dokument_final_v3_NEU.docx“ sagt dem Agent nichts — strukturierte Metadaten sind Pflicht
-  Too broad sources: When everything is a knowledge source, the agent knows everything and nothing — focus on what is relevant

Agent Builder: Add & Configure Knowledge Source



- 1 Copilot Studio → select agent → "Knowledge" tab
- 2 "Add knowledge source" → select type (SharePoint)
- 3 Enter SharePoint URL or select folder
- 4 "Save" → agent is trained with source



Agent Builder

📌 Add knowledge source: 4 clicks — after that the agent knows your SharePoint content and can answer questions about it.



When Should I NOT Build an Agent — and What Instead?

Not every problem needs an agent. The right tool saves time — the wrong one costs it.

✘ One-time task

For a single question or task, Copilot is sufficient directly.

→ Use Copilot Chat directly

✘ No clear topic

An agent without a focused task becomes a general chatbot — Microsoft has already built one.

→ Look for a pre-built agent from the store

✘ Data missing or unstructured

Garbage In, Garbage Out. If the SharePoint structure is not right, no agent will help.

→ First clean up data structure, then build agent

✘ Process unclear / frequently changing → First stabilize the process

Agent maps fixed rules. If the process constantly changes, the agent becomes outdated faster than it helps.

→ First stabilize the process

✘ No IT approval / license → First clarify governance (CA-08)

Without Copilot license and IT clearance, no productive deployment is possible.

→ First clarify governance (CA-08)

✔ When it is worth it:

Recurring task · Clear topic · Good data foundation · Stable processes · Approval in place

→ That is when Agent Builder is the right next step

Configure Behavior — Tone, Focus, Constraints

Tone & Style

What is the right tone? Precise & factual? Motivating? Formal?

Bernd: "Always respond precisely and factually. No small talk." "Always respond precisely and factually. No small talk."

Focus & Topic Constraints

Which topics should the agent limit itself to?

Bernd: "Only answer Finance questions. For everything else: refer to IT." "questions. For everything else: refer to IT." "les andere: verweise an IT."
T."

Prohibited Topics

What must the agent absolutely not address or pass on?

Bernd: "Never mention individual salaries or personal data." "n individual salaries or personal data."

Response Format

How should responses be structured? Lists, prose, tables?

Bernd: "Always respond in maximum 5 bullet points with source citation." "n maximal 5 Bullet-Points mit Quellenangabe."
."

Functional Building Blocks: Analysis · Documents · Code

Interpreter

Analysis & Data Evaluation

Tables, charts, variance analyses — the agent reads your figures and delivers structured evaluations

Beispiel-Prompt: „Analysiere die Budget-Abweichungen aus dem Q3-Report.“

Beispiel-Prompt:
"Analysiere die Budget-Abweichungen aus dem Q3-Report."

Documentsnerstellung

Reports, summaries, meeting notes — the agent writes according to your specifications

Example prompt: "Create a 1-page summary for management."

Beispiel-Prompt:
"Create a 1-page summary for management.""


Code Interpreter

Formulas, calculations, statistical evaluations — directly in the agent

Beispiel-Prompt: „Berechne den gleitenden 3-Monats-Durchschnitt.“

Beispiel-Prompt:
"Berechne den gleitenden 3-Monats-Durchschnitt aus diesen Zahlen."

Exercise: Bernd Builds His Finance Reporting Agent Live

 **GOAL:** A Finance Agent that answers questions about Northern Light Corporation's budget reports, creates executive summaries, and analyzes budget variances — in 4 configuration steps.

1 — Set up knowledge sources: Which SharePoint documents should Bernd's agent know?

2 — Configure behavior: Tone, focus, constraints for the Finance Agent

3 — Ask test questions: 3 questions that Bernd would ask his agent

4 — Your use case: Which own agent would you build following this pattern?

Learning Check 3 — Module 3: Agent Builder

6 questions — 1 correct answer each.

Question 1 Garbage In, Garbage Out for agents means:

- A) Delete old files
- B) Poor sources → poor agent regardless of technology
- C) Agents generate errors with too many sources
- D) Regularly empty the SharePoint recycle bin

Question 3 Configuring behavior includes:

- A) Only the language of the agent
- B) Only permitted topics
- C) Tone, focus, prohibited topics, response format
- D) License management and access rights

Question 5 Code Interpreter is useful for:

- A) Email drafts
- B) SharePoint access rights
- C) Complex calculations and data evaluations
- D) Meeting notes

Question 2 Best knowledge source category for internal agents?

- A) Public websites
- B) Teams chats and private messages
- C) SharePoint and OneDrive with structured documents
- D) External APIs from CRM systems

Question 4 HITL Gate is NOT needed for:

- A) External emails on behalf of a person
- B) Budget approvals
- C) Internal Teams notifications to your own team
- D) Deleting important files

Question 6 Outdated documents as knowledge source are problematic because:

- A) Too much storage space
- B) Nicht in SharePoint
- C) Agent gives outdated answers with confidence
- D) Older file formats not readable



BREAK

Screen off - briefly stand up - back in 15 minutes

After the break: Module 4 — Copilot Studio: When Agent Builder Is No Longer Enoughwhen Agent Builder is no longer enough

- 💡 Think about: Your agent design off CA-25 — write Sie 3 3 bullet points: : knowledge source
· Key behavior setting · First test question.

Copilot Studio — When and Why the Next Step?

AGENT BUILDER

- ✓ No code required
- ✓ 15–30 min for basic agent
- ✓ SharePoint/Teams as sources
- ⚠ Limited logic and flows
- ⚠ No API access to external systems



COPILOT STUDIO

- ✓ Complex conversation logic (Topics)
- ✓ API connection (SAP, Salesforce, ERP)
- ✓ Org-wide rollout & governance
- ✓ Deep Power Automate integration
- ⚠ More onboarding time needed

From Agent Builder to Copilot Studio — The Handover

1

1 — Open Agent in Studio

Agent Builder agent → "Open in Copilot Studio" → complete configuration visible onfiguration sichtbar

2

2 Topics & Konversationslogik

In Studio: "Topics" = defined conversation themes with branches and conditions. n und Bedingungen.

3

3 Power Automate Flows verbinden

Directly from Studio: Power Automate flows as actions — email, SharePoint, Teams, SAP

4

4 — Publish & Rollout

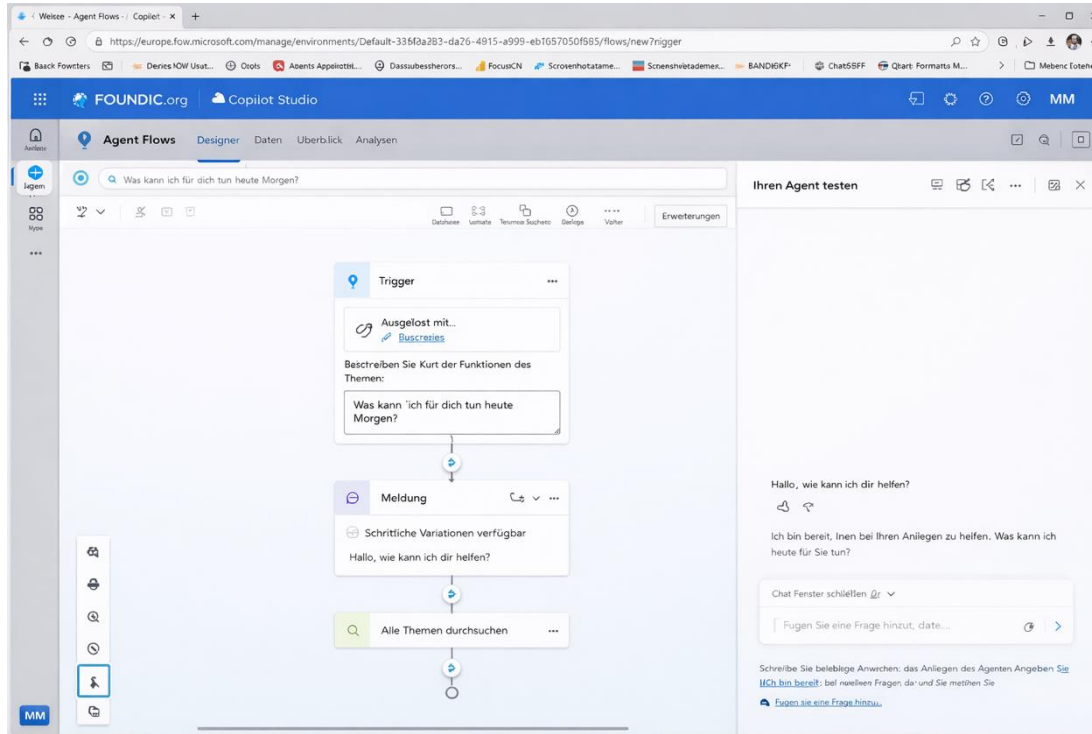
Deploy agent in Teams · Publish as app · User groups · Activate analytics



The typical path is Builder → Studio → Rollout. In many cases no redevelopment is needed — the agent can grow with the requirements.



Copilot Studio: First Steps & Navigation



- 1 copilotstudio.microsoft.com → Sign in → select agent
- 2 "Topics" → "New topic" → enter trigger phrase
- 3 "Call a flow" → select Power Automate flow
- 4 "Test" → try agent in test window → Publish



Copilot Studio

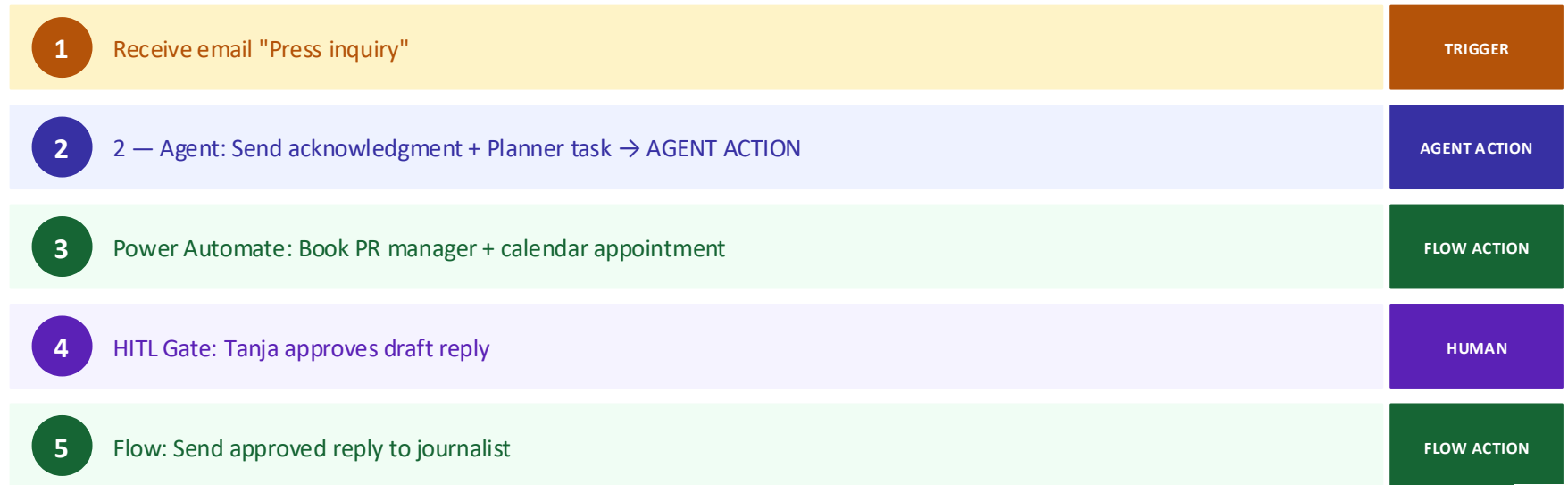
📌 Copilot Studio: 4 steps from the home page to the first topic — the structure is more logical than it looks.



Power Automate Integration — Connecting Complex Workflows


Copilot Studio + Power Automate = Agent with conversation channel AND complex process automation in one platform.

TANJA'S EXTENDED AGENT — WITH POWER AUTOMATE



📌 Agent + Power Automate = complete process: from the email to the approved reply — with HITL Gate for safety.

Exercise: Tanja's Communications Agent in Copilot Studio Extend It

 TASK: Tanja's press inquiry agent (from CA-16) is to be extended in Copilot Studio. Goal: complex dialogues + Power Automate flow for calendar booking + HITL Gate.

1 — Which new Topic would you build in Copilot Studio for "escalate press inquiry"? Describe the trigger phrase and conversation flow.

2 — Which Power Automate flow is integrated as an action? What are its steps (trigger, actions)?

3 — Where do you set the HITL Gate — and what happens if Tanja does not respond within 4 hours?

4 — Your agent: Which extension would improve your own agent (from CA-29) the most in Copilot Studio?

Agent Governance — Who Can Build and Deploy What??

Individual User Agents

Anyone can use Agent Builder — for personal assistants without team deployment

Rule: No IT approval required · For own use only

Team Agents

Agent is deployed in team channel — team leader approval recommended · Data protection check

Rule: Data protection check · Documentation of knowledge sources

Org-wide Agents

Copilot Studio + IT + Data Protection Officer + Management approval · GDPR compliance

Rule: GDPR compliance · Define SLA · Analytics mandatory

Governance Document

Minimum content: Purpose · Knowledge sources · Authorized users · HITL rules · Deletion deadlines

Rule: Mandatory for every team and org agent

Rollout Strategy — From Pilot to Organization

1**Pilot (1–3 people)**

1 agent · 1 use case · 2–4 weeks · collect feedback

→ Goal: Does the basic idea work?

2**Early Adopters (5–15 people)**

Improve agent based on pilot feedback · Create governance document · Involve IT

→ Goal: Is the agent stable and safe?

3**Team Rollout (department)**

Training for all users · Communicate HITL rules · Define support process

→ Goal: Is the agent used daily?

4**Organization-wide rollout**

Copilot Studio · IT governance · Analytics · Continuous improvement based on usage data

→ Goal: Is the agent scalable and sustainable?



Rollout = Pilot → Early Adopters → Team → Org. Each phase has a clear goal. Never jump directly to phase 4.



Architectural Framework Conditions — What You Need to Know

 Identity & Access Rights: Agent inherits the permissions of the user — no more, no less. Zero-Trust applies to agents too.

 Logging & Traceability: All agent actions are logged. Analytics in Copilot Studio. Mandatory for compliance and debugging.

 Data Storage & Jurisdiction: M365 data is stored in EU data centers (for EU customers). Check: data residency settings in Admin Center.

 Agent lifecycle: Agents must be maintained — update knowledge sources, review behavior, and deactivate outdated agents.

 EU AI Act Relevance: Agents that make decisions or influence people can be classified as an "AI system" — documentation obligation.

Learning Check — Module 5: Governance & Rollout

6 questions — 1 correct answer each.

Question 1 What must be included in a governance document?

- A) Only agent name and license costs
- B) Purpose, knowledge sources, authorized users, HITL rules, deletion deadlines
- C) Only IT administrator name
- D) Only technical configuration

Question 3 Correct rollout sequence?

- A) Org → Team → Early Adopters → Pilot
- B) Direct org rollout
- C) Pilot → Early Adopters → Team → Org
- D) Team → Pilot → Org

Question 5 Copilot Studio is NOT suitable for:

- A) API connection to SAP
- B) Org-wide rollout
- C) Complex conversation logic
- D) Fast personal assistant without IT need

Question 2 When is NO IT approval needed for an agent?

- A) Org-wide rollout for 500 employees
- B) Team agents with customer data
- C) Personal individual user agents for own use
- D) Agents that send external emails

Question 4 Agent inherits access rights from:

- A) IT administrator
- B) The current user of the agent
- C) Microsoft automatically
- D) The deployer

Question 6 EU AI Act relevant for agents when:

- A) Always for all agents
- B) Agent has more than 5 users
- C) Agent makes decisions or influences people
- D) Only for agents developed in Copilot Studio

48h Commit — Your First Own Agent in 48 Hours

Today you understood, planned, and configured agents. Now the decisive step: build.

1

My Agent — Tool & Use Case

Tool (Agent Builder / Copilot Studio) — and which process do I specifically automate?

2

Knowledge sources & SharePoint check

Which 2–3 SharePoint folders are my knowledge sources — and are they current and cleanly structured?

3

First test question & pilot user

Which first test question do I ask my agent — and who do I invite as the first pilot person?

Key Takeaways — What You Take Away from This Training

**M1**

Decision matrix: Copilot → Pre-built agent → Workflow Agent → Agent Builder → Copilot Studio — always start with the simplest toolways the simplest tool first

**M2**

If-Then with conversation channel · HITL Gate for external and critical actions · Knowing the limits prevents over-automation

**M3**

Garbage In, Garbage Out · Knowledge source check is mandatory before building · Agent Builder = powerful without code in 15–30 minutes

**M4**

Copilot Studio = Agent Builder + external APIs + Power Automate + org-wide rollout · agents grow with your requirements/Anforderungen

**M5**

Governance protects · Rollout = Pilot → Team → Org · Know the EU AI Act · Maintain and update agents



Glossary — Key Terms

BACKUP — Show only on request

Copilot Agent

Specialized AI assistant with its own knowledge and actions

Workflow Agent

Agent that acts on If-Then basis without manual triggering

Agent Builder

Graphical M365 interface: build your own agents without code

Copilot Studio

Low-code platform for complex agents and org-wide rollout

HITL Gate

Human-in-the-Loop — human must confirm before agent action

Knowledge Source

Dataset on which an agent is based (SharePoint, Teams, Web)

Trigger

Event that starts a Workflow Agent

Power Automate

Process automation — integratable as action in Copilot Studio

Agent Governance

Rules for building, deploying, and using agents




EU AI Act

EU regulation for risk classification of AI systems

You Did It!



Thank you for your time and trust.

-  **I hope you took something away** — and will put it into practice starting tomorrow.
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